

FIG. 1

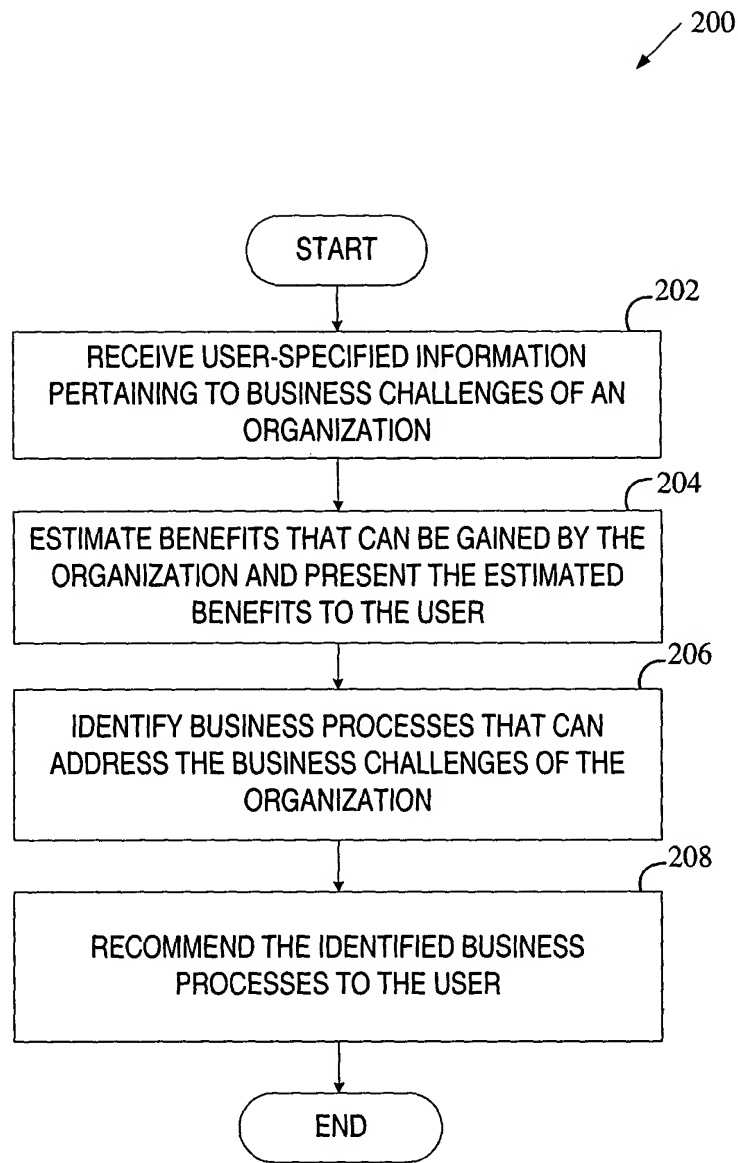


FIG. 2

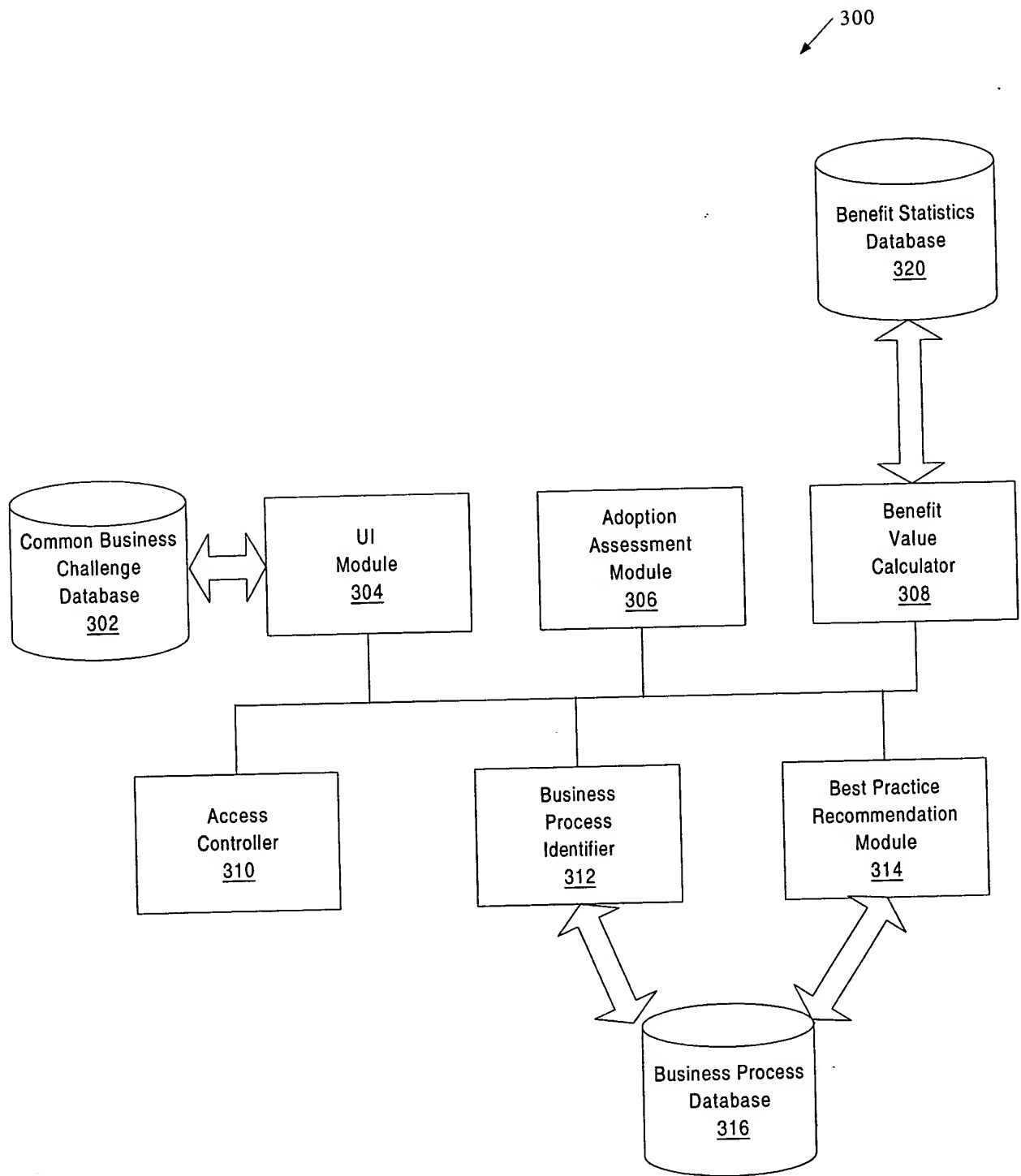


FIG. 3

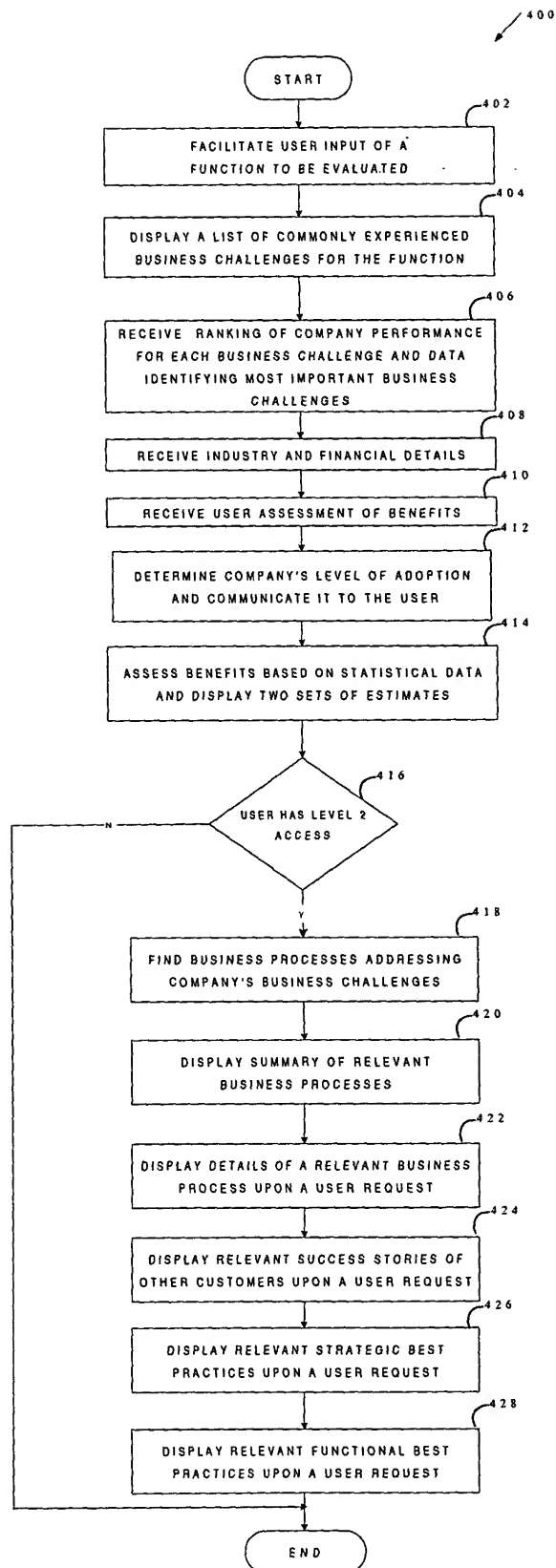


FIG. 4

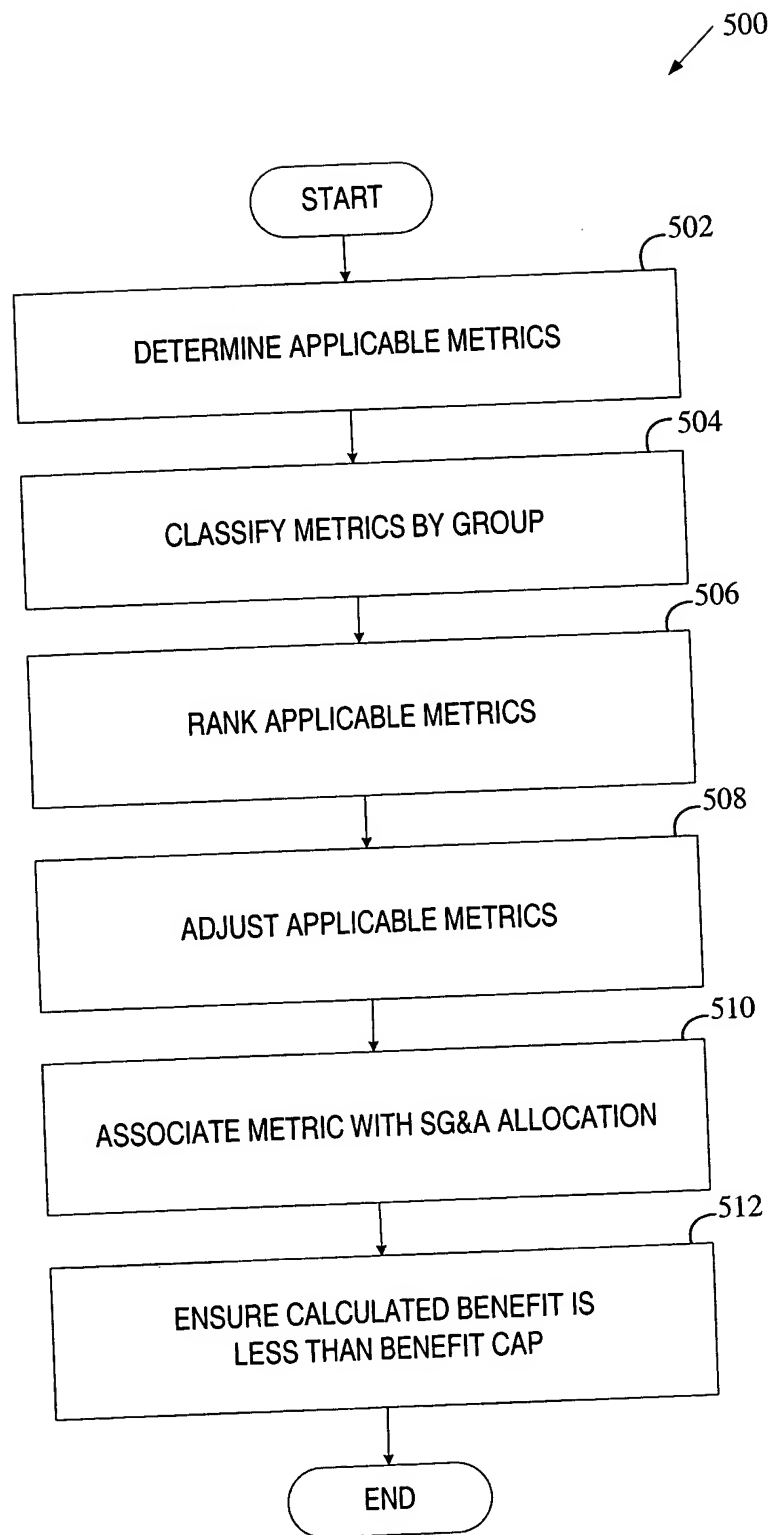
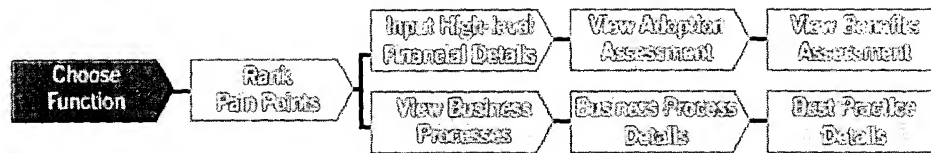


FIG. 5



Choose Function

To begin, choose a function that you would like to evaluate. You may return to assess additional functions, and the latest results of each assessment you complete are saved for later review and updates.

Function	Assess This Function	View Previous Assessment
Sales		Review results or update inputs >
Service		Review results or update inputs >
Marketing	Begin the assessment >	
Employees	Begin the assessment >	
Partners	Begin the assessment >	
Integration	Begin the assessment >	

FIG. 6A

Function: Sales



Rank Pain Points

Next, please rank the performance of your business for each of the following pain points relating to Sales on a scale of 1 to 4 as follows:

1. Poor
2. Below Average
3. Above Average
4. Best in Class

Your overall level of adoption of integrated business processes and related best practices for Sales will be assessed based on your rankings for all pain points listed below.

Also, please identify the three pain points from the list below that are most important to your business. High-level financial and performance benefits will be estimated based on the value of fully adopting integrated business processes and related best practices for the three pain points you choose.

Sales Pain Points	Ranking 1=Poor, 4=Best in Class	Most Important (Three only)
Save Pain Point Information		
Optimizing sales team resource allocation and managing territories	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input checked="" type="checkbox"/>
Producing accurate, timely, actionable sales forecasts	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input checked="" type="checkbox"/>
Understanding and managing the day-to-day focus of the sales organization	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input checked="" type="checkbox"/>
Ensuring that new sales team members learn and contribute quickly	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Maximizing the overall productivity of the sales organization	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Qualifying and prioritizing leads	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Routing leads to the appropriate sales team members and ensuring timely follow-up	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Ensuring that sales teams fully understand customers' businesses, pain points, strategic and financial priorities, and industries	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Maintaining a consistent and effective approach to selling	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Delivering accurate, high-quality, current sales proposals	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Generating accurate, valid quotes consistently based on the latest product, pricing, configuration, and bundling information	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Providing sales teams with up-to-date information regarding product availability, order status, and shipping status	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Communicating order information internally and externally for fulfillment	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Implementing and maintaining simple, transparent, flexible, and effective sales compensation systems	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Selling collaboratively over the Web	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Managing product portfolios and catalogs	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Establishing and maintaining effective pricing strategies	⊙ 1 ⊙ 2 ⊙ 3 ⊙ 4	<input type="checkbox"/>
Save Pain Point Information		

FIG. 6B

Function: Sales



Input Industry and High-Level Financial Details

To enable us to quantify the potential financial impact on your business of successfully addressing the pain points you have identified, please input your industry and annual revenue from your most recent fiscal year. Then, accept or modify the dollar values and percent of revenue that we estimate for selling, general, and administrative costs, based on your revenue and industry.

Step 1

Select your industry:

Cross Industry Average

Step 2

Total annual revenue:

\$10,000

Total annual selling, general, and administrative costs:

\$3,600

 or

36

 % of revenue.

Submit

FIG. 7

Benefits Self Assessment

Please input your estimates, in terms of percent improvement, for the benefits that your business can achieve from successfully addressing each of the most important pain points you have identified.

If you have assessed more than one functional area it is important to understand that the benefits self assessment is cumulative in nature and any additional benefit values are incremental to the values previously reported for other functional areas.

	% Increase in Total Annual Revenue	% Decrease in Selling, General, & Administrative Costs	% Increase in Customer Satisfaction	% Increase in Employee Morale
Optimizing sales team resource allocation and managing territories	<input type="text" value="0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %	<input type="text" value="0"/> %
Producing accurate, timely, actionable sales forecasts	<input type="text" value="0"/> %	<input type="text" value="0"/> %		
Understanding and managing the day-to-day focus of the sales organization	<input type="text" value="0"/> %	<input type="text" value="0"/> %		

Save Financial Details and Self-Assessment

FIG. 8

Function: Sales



Adoption Assessment

Based on the type and severity of pain points you have identified for Sales, we classify your company as having Substantial Improvement Opportunities.

Level of Adoption	Description
1 - Substantial Improvement Opportunities	Developing and implementing comprehensive Customer, Partner, and Employee Relationship Management strategies can greatly increase competitiveness by addressing critical pain points and generating significant financial returns
2 - Early-Stage Adopter	Building on early successes to impact additional pain points can create competitive advantage
3 - Emerging Leader	Focused achievement of best practices for remaining pain points can solidify industry leadership
4 - Best Practitioner	Maintaining leading-edge business processes and best practices and ensuring consistent and efficient execution can extend competitive advantage over time

Continue to Benefits Summary

FIG. 9

High-Level Benefits Summary

The following is an assessment of the impact on high-level financial and performance measures from successfully addressing the Pain Points that you have identified as being most important to your business. Two sets of estimates are provided: one based on the percent improvements you just input, and another set of conservative improvements based on our experience with over 3,000 customer implementations.

Based on Your Estimated Percent Improvements From Successfully Addressing Top Pain Points
 Estimated Direct Revenue, Cost, Customer Satisfaction, and Employee Morale Benefits

	% Improvement ¹	Annual Dollar Value	Total Annual Revenue	Total Annual Selling, General, and Administrative Costs ²	Customer Satisfaction ³	Employee Morale ³
Selling						
Service	15%	\$ 1.5	\$ 1.5	\$ 0.9	10.0%	10.0%
Marketing	25%	\$ 2.5	\$ 2.5	\$ 2.5	See Below	See Below
Employees	15%	\$ 1.5	\$ 1.5	\$ 1.5	See Below	See Below
Production						
Integration	0.0%	\$ 0.0	\$ 0.0	\$ 4.0	0.0%	0.0%
Total	% Improvement	Annual Dollar Value	Total Annual Revenue	Total Annual Selling, General, and Administrative Costs	Customer Satisfaction	Employee Morale
	11.5%	\$ 4.5	\$ 4.5	\$ 11.5	15.0%	12.0%
					See Below	See Below

Estimated Additional Revenue and Cost Benefits from Direct Customer Satisfaction and Employee Morale Benefits Used Above: ^{2,3}

Total	% Improvement	Annual Dollar Value	Total Customer Satisfaction	% Improvement	Annual Dollar Value	Total Employee Morale	% Improvement	Annual Dollar Value
	3.0%	\$ 3.0		2.6%	\$ 2.6		0.9%	\$ 0.9
Total	% Improvement	Annual Dollar Value	Total Employee Morale	% Improvement	Annual Dollar Value	Total	% Improvement	Annual Dollar Value
	0.0%	\$ 0.0		0.0%	\$ 0.0		0.8	\$ 0.8

Estimated Total Revenue and Cost Benefits to your Organization

Total	Annual Dollar Value	Annual Dollar Value	Annual Dollar Value
	\$ 12.5	\$ 12.5	\$ 7.8

¹ Improvement Percentages and Savings Estimates assume that Selling, General, and Administrative Costs are composed as follows: Selling Costs (35%), Marketing Costs (15%), Service Costs (25%), IT Costs (5%), Other Costs (20%)

² Although no Revenue benefits have been included in "Direct" estimates for improvements in Customer Satisfaction, we have generally noted an additional 1-3% increase in total revenue for each 10% increase in Customer Satisfaction levels. This revenue increase is itemized separately in the "Estimated Additional Revenue and Cost Benefits" section of the High-Level Benefits Summary

³ Although no Cost benefits have been included in "Direct" estimates above for improvements in Employee Morale, we have generally noted an additional 0.5-2% decrease in total Selling, General, and Administrative Expenses for each 10% increase in Employee Morale levels. This cost decrease is itemized separately in the "Estimated Additional Revenue and Cost Benefits" section of the High-Level Benefits Summary

FIG. 10

Function: Sales



Summary of Related Business Processes

To begin developing a strategy for addressing the pain points you have identified, drill down on the related business processes below. Each business process includes detailed information to help you better understand how this business process could benefit your company:

- Business process description
- Performance metrics to measure and evaluate process effectiveness
- Best practices designed to ensure your success
- Success stories of customers who have successfully addressed similar pain points

Optimizing sales team resource allocation and managing territories		
YOUR RANKING 1 <small>(1=Poor, 4=Best in Class)</small>	Related Business Processes	<u>Define Sales Segmentation</u>
		<u>Construct Coverage Strategy</u>
		<u>Plan Sales Force Quotas</u>
Producing accurate, timely, actionable sales forecasts		
YOUR RANKING 1 <small>(1=Poor, 4=Best in Class)</small>	Related Business Processes	<u>Define and Revise Methodology</u>
		<u>Create Sales Forecast</u>
		<u>Register Opportunity</u>

FIG. 11

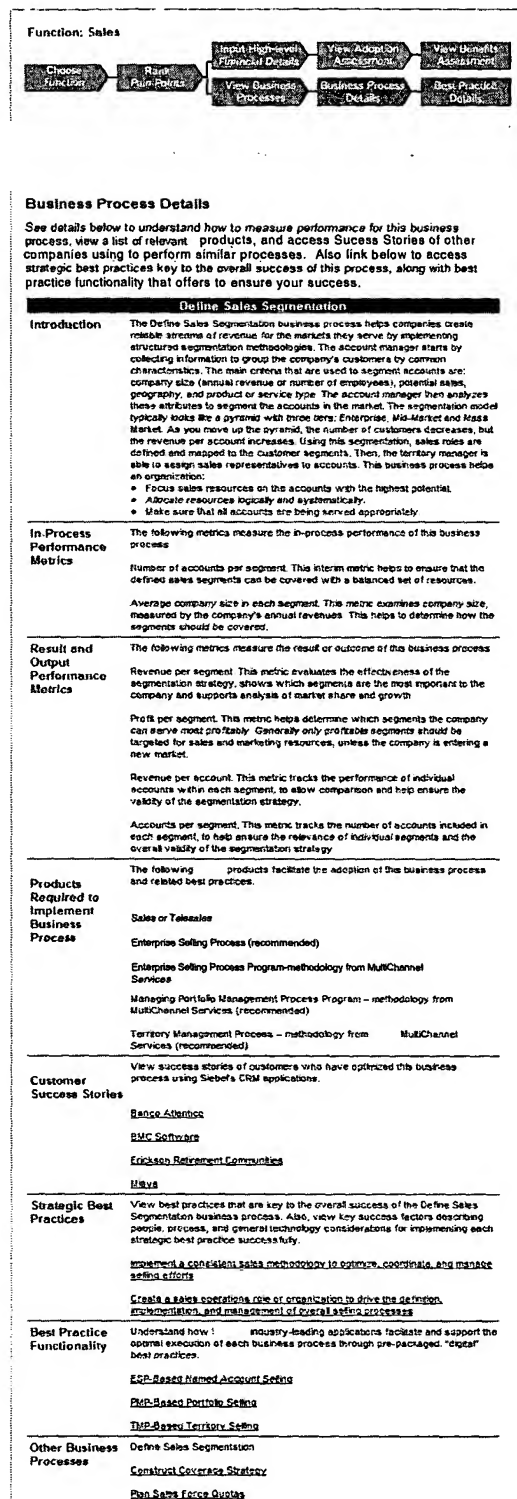


FIG. 12

Function: Sales



Strategic Best Practice Details

Strategic best practices are key to the overall success of a business process. Key success factors describe people, process, and general technology considerations for implementing each strategic best practice successfully.

Implement a consistent sales methodology to optimize, coordinate, and manage selling efforts

Detailed Description

Effective sales methodologies provide a common framework for sales execution considering such factors as overall corporate strategy, selling strategy and organization, products, target customers, and competitive dynamics. Sales methodologies define the sales process and provide a common language for assessing deal status, including such factors as timing and likelihood of closure. Sales methodologies also help optimize selling tactics and focus effort for particular accounts and opportunities.

Standard sales methodologies improve sales efficiency and productivity by ensuring the consistent application of optimal selling approaches, improving communication and collaboration among distributed sales teams, and providing a consistent foundation for managing complex and distributed sales organizations.

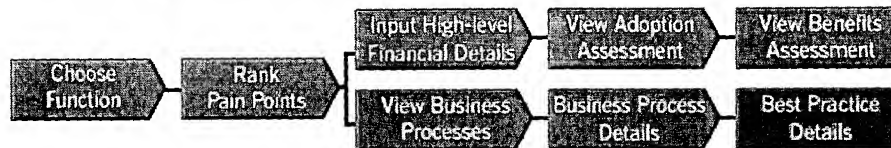
Key Success Factors

- Sales management must define an appropriate sales methodology in light of internal and external needs and requirements
- Sales management must drive adoption of the sales methodology by communicating its value to sales reps in their own terms, ensuring that well respected sales rep "floor leaders" champion adoption, providing coaching and training, and measuring and rewarding adherence and adoption
- Information systems must consistently support the implementation of the chosen sales methodology throughout the organization
- Information systems must provide role-specific selling assistance to individuals based on their role within the sales team
- Information systems must support the real-time aggregation and analysis of key deal status indicators defined by the sales methodology across such variables as sales periods, accounts, sales reps, sales stages, products, and regions
- Information systems must track key indicators of usage and adoption of the sales methodology by individual sales reps
- Sales management must adopt the sales methodology into its own processes, such as pipeline management and forecasting

[Return to Business Process](#)

FIG. 13

Function: Sales



Best Practice Functionality Details

Understand how our industry-leading applications facilitate and support the optimal execution of each Business Process through pre-packaged, “digital” best practices.

ESP-Based Named Account Selling	
Detailed Description	<p>The Enterprise Selling Process (ESP) is a structured methodology for sales, sales support and marketing teams responsible for penetrating, covering and growing their largest accounts. The ESP Methodology includes the following</p> <ul style="list-style-type: none">• Account segmentation to ensure that the account team identifies and sells across multiple units of the account.• Planning and strategy development to win new business and use partner and customer relationships.• Creating action plans to measure and monitor progress against the account plan in order to assure continuous opportunity development and relationship management.

FIG. 14

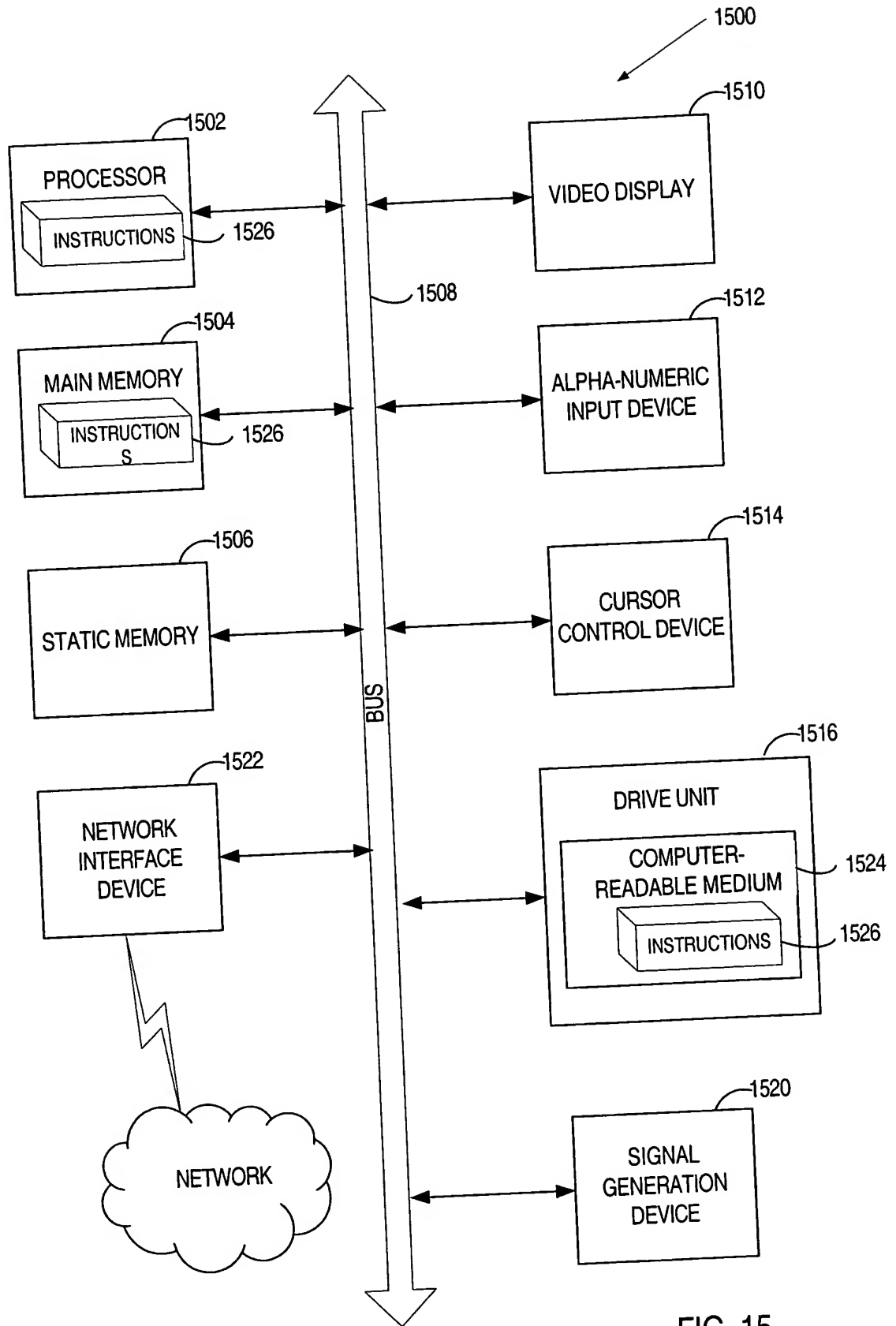


FIG. 15